MaxInSight™ Manual

MAX Communication Server

Release 6.0

Update2

2/2009 4504-0014-6.0 Update2

WARNING!

Toll fraud is committed when individuals unlawfully gain access to customer telecommunication systems. This is a criminal offense. Currently, we do not know of any telecommunications system that is immune to this type of criminal activity. AltiGen Communications, Inc. will not accept liability for any damages, including long distance charges, which result from unauthorized and/or unlawful use. Although AltiGen Communications, Inc. has designed security features into its products, it is your sole responsibility to use the security features and to establish security practices within your company, including training, security awareness, and call auditing.

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Warranty

What The Warranty Covers

AltiGen Communications warrants its hardware products to be free from defects in material and workmanship during the warranty period. If a product proves to be defective in material or workmanship during the warranty period, AltiGen Communications will, at its sole option, repair, refund or replace the product with a like product.

How Long the Warranty Is Effective

All AltiGen Communications products are warranted for one year for all parts from the date of the first end user purchase.

Whom the Warranty Protects

This warranty is valid only for the first end user purchaser.

What the Warranty Does Not Cover

1. Any product on which the serial number has been defaced, modified or removed.
2. Damage, deterioration or malfunction resulting from:
    a) Accident, misuse, neglect, fire, water, lightning, or other acts of nature, unauthorized product modification, or failure to follow instructions supplied with the product.
    b) Repair or attempted repair by anyone not authorized by AltiGen Communications.
    c) Any damage of the product due to shipment.
    d) Removal or installation of the product.
    e) Causes external to the product, such as electric power fluctuations or failure.
    f) Use of supplies or parts not meeting AltiGen Communications' specifications.
    g) Normal wear and tear.
    h) Any other cause which does not relate to a product defect.
3. Shipping, installation, set-up and removal service charges.

How to Obtain Service

End user customers should contact your Authorized AltiGen Dealer for service.

Authorized AltiGen Dealers must follow the steps below for service:

1. Take or ship the product (shipment prepaid) to your AltiGen distributor or to AltiGen Communications, Inc.

All materials being returned to AltiGen must have an associated RMA number. RMA numbers are issued by AltiGen Technical Support and can be obtained by calling 1-888-258-4436 or faxing an RMA form to 510-252-9738, attention Technical Support. AltiGen reserves the right to refuse return of any material that does not have an RMA number. The RMA number should be clearly marked on the outside of the box in which the material is being returned. For example:

Attn.: RMA #123
AltiGen Communications, Inc.
4555 Cushing Pkwy.
Fremont CA 94538

Upon authorization of return, AltiGen will decide whether the malfunctioning product will be repaired or replaced.

2. To obtain warranty service, you will be required to provide:
    a) the date and proof of purchase
    b) serial number of the product
    c) your name and company name
    d) your shipping address
    e) a description of the problem.
3. For additional information contact your AltiGen Dealer or AltiGen Communications, Inc.

Effect of State Law

This warranty gives you specific legal rights, and you may also have other rights which vary from state to state. Some states do not allow limitations on implied warranties and/or do not allow the exclusion of incidental or consequential damages, so the above limitations and exclusions may not apply to you.

Sales Outside the U.S.A.

For AltiGen Communications products sold outside of the U.S.A., contact your AltiGen Communications dealer for warranty information and services.

Overview and Installation

AltiGen MaxInSight is a workgroup performance application. It provides call center managers and agents with the ability to track workgroup status and performance data from a wall-mounted LCD panel or from their PCs.

MaxInSight includes the ability to see the following for single or multiple workgroups:

- Real-time queue status
- Real-time workgroup resource status
- Daily operation results
- Trends of data over time

Users can configure:

- Several types of data displays, or views
- Alerting thresholds
- The display interval for different workgroups' statuses when those workgroups are configured into in a single template
- Character font size and color
- The MaxInSight skin

MaxInSight runs with the MAX Communication Server ACC or ACM 6.0 Update2 or later systems.

Licensing

MaxInSight requires an AltiGen MaxInSight session license.

System Requirements

The client system must meet the following minimum requirements:

- IBM/PC AT compatible system
- 2 GHz CPU or above

- Windows XP Professional SP3, Windows Vista Business Edition, or Windows 2003
- 1 GB available hard drive disk space
- 512 MB RAM
- SVGA monitor (1024 x 768) with 256 color display, or better
- Keyboard and mouse
- MAX Communication Server ACC 6.0 Update2 or MAX Communication Server ACM 6.0 Update2 running on a server accessible to this client.

Pre-Installation Checklist

Before installing MaxInSight, make sure the following is done:

- MAXCS ACC/ACM 6.0 Update2 has been installed on the system server.
- The MaxInSight License Key has been installed and activated on the system server.
- TCP/IP is enabled on both machines.
- The client is able to connect to the server on the network.
- The person installing MaxInSight has local administrator rights on the client PC.

Installing MaxInSight on a Client System

When the above items are done, follow these steps on the client machine:

1. Exit all Windows applications.
2. Insert the MAXCS 6.0 Update2 Clients CD into the CD ROM drive.
3. Open the **MaxInSight** folder, and run the **Setup** program in that folder, following the step-by-step installation instructions as they appear on the screen.

Alternatively, if your system administrator has loaded MaxInSight on a shared network server, you can copy the files in the MaxInSight folder to your desktop PC, and run the MaxInSight **Setup** program.

Uninstalling MaxInSight

1. From the Windows **Start** menu, select **Control Panel > Add/Remove Programs > MaxInSight** to uninstall MaxInSight.
2. Click **Remove**, and respond to any additional prompts.

Getting Started

Start MaxInSight from the Microsoft Windows **Start** menu, by choosing **Start > All Programs > MaxInSight > MaxInSight**.

If you are connecting to the Internet through a modem connection, before you log in, establish a session connection from your PC to your local Internet service provider. If you're using a low-speed connection, the login may take some time, since a large amount of data is transferred to your desktop.

Logging In

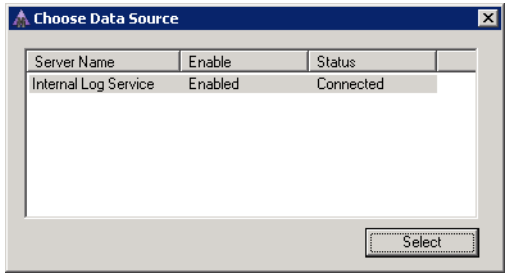
1. If this is your first login to this MAX Communication Server ACC/ ACM system, enter the system server's IP address or the name of the system server you will be using. To obtain the server name or IP address, ask your system administrator.

   (Subsequently, when you log in, you'll see the IP address in the **Server** field.)

2. Enter your **Extension** number and **Password** assigned to your phone. (You can also log in as a workgroup or a huntgroup.)

If you want to store your login password and have it entered automatically the next time you log in to MaxInSight, check the **Always save password** check box.

3. Click **Sign in** or press the **Enter** key. (To back out of logging in, press the **Esc** key.) The Choose Data Source dialog box appears:



4. Select a log service. Only enabled and connected log servers can be selected. (The number of entries listed in the Choose Data Source dialog box depends on the number of logger servers installed with the MAX Communication Server.)

When Connection Is Broken

When a connection with the phone server is broken, a message box pops up letting you know. After you click **OK** in the message box, the application closes, and you will need re-launch it.

The MaxInSight Main Window

Once you log in to MaxInSight, a blank main window appears. It has a menu bar at the top, containing **Configure**, **Add**, **View**, and **Help** menus. The figure below shows the **Configure** menu.

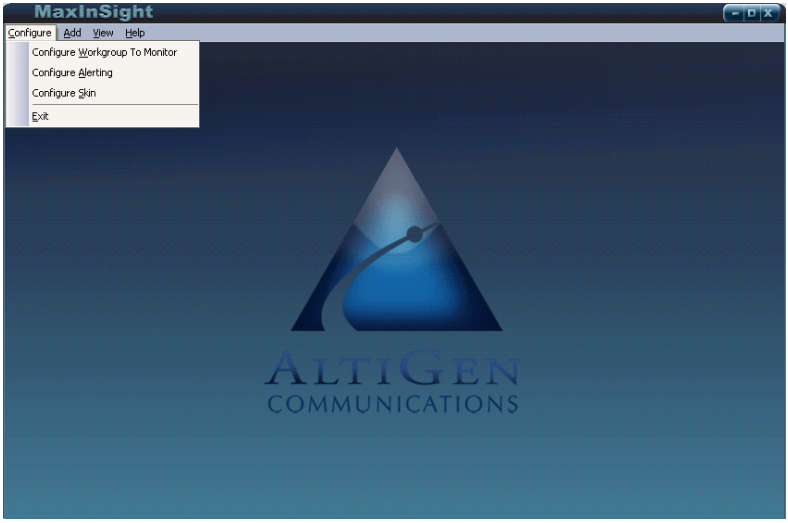
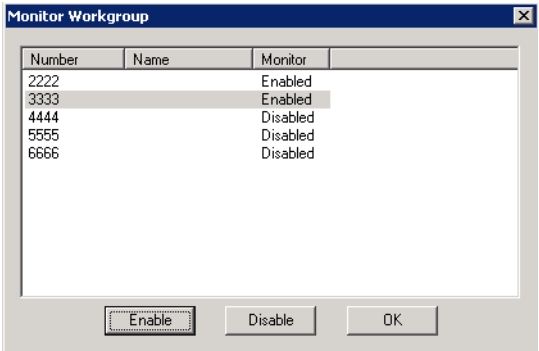


*Figure 1. MaxInSight main window with the **Configure** menu opened*

MaxInSight remembers the workgroups you enable, and the configuration and position of views, so when you log in again, the remembered workgroups are enabled automatically, and the views are displayed as they were when you logged out.

Making Workgroups Available for Monitoring

Before you can monitor a workgroup, you must enable it. To do so, choose **Configure > Configure WG to Monitor**.



Click a column head to sort the column in ascending or descending order

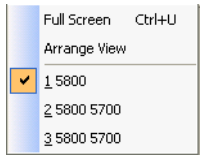
All workgroups configured in your company's MAX Communication Server are listed in this dialog box. Select a workgroup you want to monitor, and click the **Enable** button. Enter the workgroup password when requested. Repeat for each group you want to monitor. Workgroups you enable will be available to you in other MaxInSight configuration screens. When finished, click **OK**.

To disable a workgroup, select it and click the **Disable** button. Workgroups that you disable will *not* be available in other MaxInSight configuration screens.

Arranging the Display

After you have configured views (see "Configuring Data Displays" on page 13), you can control the MaxInSight display with the following methods.

- Using commands on the **View** menu (and keyboard equivalent):



  Full Screen enlarges a view to fill the screen and hides the MaxInSight title bar and menus. To get the MaxInSight main window and its menus back, press **Ctrl+U** (**Ctrl+U** is a toggle) or the **Esc** key. You can also right-click on the border of the MaxInSight screen (*not* within a view) and choose **View > Full Screen/Restore**.

  Arrange View fills the MaxInSight window with an orderly distribution of each view. For an example, see Figure 2, below.

  The bottom of the View menu lists your current views. The view appearing first in your display is checked. To make another view the first displayed, click it in the menu list, and then choose **View > Arrange View**. The newly selected view now appears first.

- Using commands on the right-click menu: in some situations, the commands are **Minimize**, **Maximize**, **Restore**, **Close**. When you are working in Full Screen, the commands **Full Screen/Restore** and **Arrange** are available if you right-click on the border of the MaxInSight screen (*not* within a view).
- Moving the windows in the standard Windows fashion:

Resize the MaxInSight window and view windows by placing the cursor at a window edge or corner, then drag the window to the size you want.

Move a window by clicking and dragging its title bar.

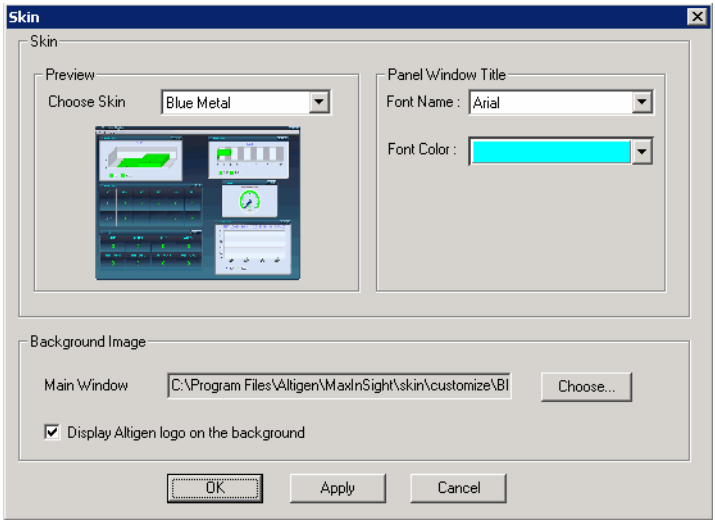
Dismiss a window by clicking the close button in the upper right corner.

Minimize a window by clicking its **Minimize** button.

*Figure 2. Result of choosing the **View** > **Arrange View** command to display five configured views*

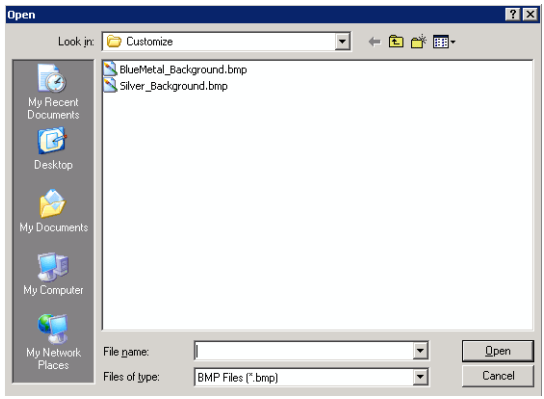
Changing the Skin

You can select a skin for MaxInSight. The skin defines the title bar and border of the main MaxInSight window and view windows. Choose **Configure** > **Configure Skin**. The following dialog box is displayed:



In this dialog box, you can

- Select a skin (the display in the dialog box changes to show you what the skin looks like)
- Specify font name and color for the title window of views
- Specify a background image for the main window by clicking the **Choose** button to pop up an **Open** dialog box:



Choose a .bmp image file from any folder, and click the **Open** button.

- Choose to remove the AltiGen logo from the background of the Main window by clearing the **Display AltiGen logo on the background** check box.

Configuring Data Displays

After you have enabled the workgroups you want to monitor (**Configure > Configure Workgroup to Monitor**), you can then configure the data displays you want to see.

Configuring Workgroup Data Displays

You can display rows of workgroup data in the following ways:

- One workgroup only
- Multiple workgroups in rotating views, one workgroup at a time
- Multiple workgroups on display at the same time

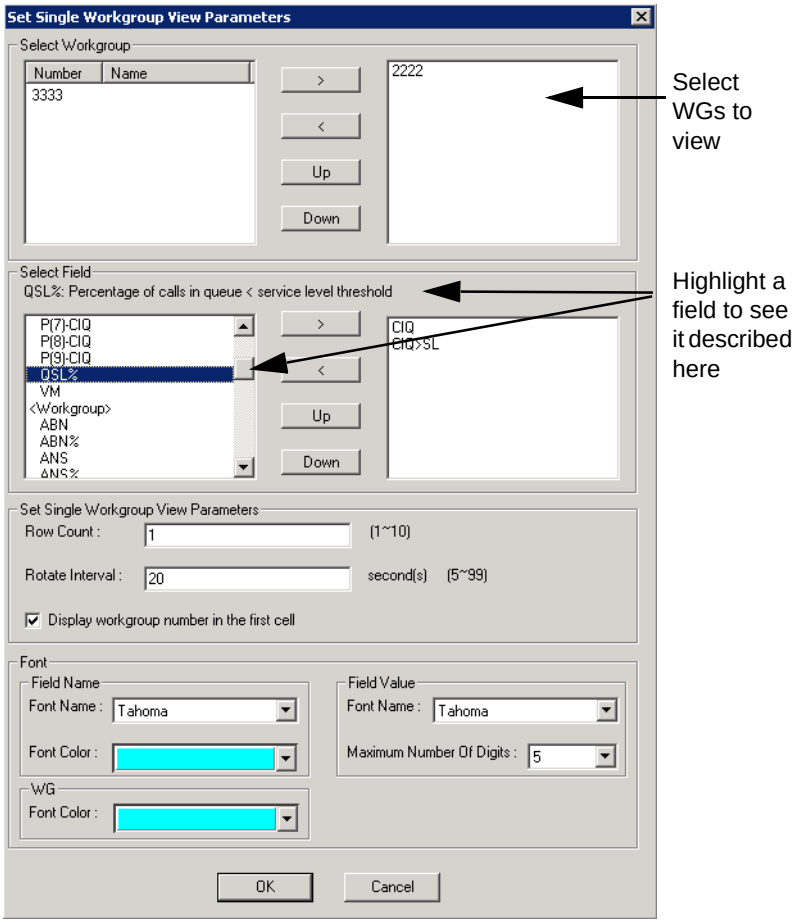
In addition to row views, you can also create gauge views, time line views, and bar views.

You can configure individual fields to alert you when specified thresholds are reached. See “Configuring Alerts” on page 24.

Configuring for a Single Row-Type Display

To configure a row view for a single workgroup or multiple workgroups in a rotating display, choose **Add > Add Single Workgroup View**.

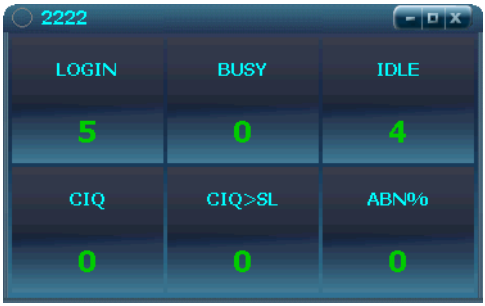
A configuration dialog box opens, listing the workgroups you have enabled:



1. To select a workgroup, highlight it and click the Right-arrow button. You can select multiple workgroups to monitor, but in this configuration only one workgroup view at a time is displayed. When multiple workgroups are selected, the data of each one is displayed in rotation. You can specify the order of the rotating display by arranging the order of the selected workgroups: highlight a workgroup and click the Up or Down arrow button to move it to where you want it.
2. Select the fields you want to monitor. The fields are arranged in three categories: Queue, Workgroup, Agent. To see an explanation of each field (appearing just above the fields list), highlight the field.

Use **Shift+click** to select multiple adjacent fields. Use **Ctrl + click** to select multiple non-adjacent fields. Then click the Right-arrow button to move them to the right-hand column. To remove fields, select them and click the Left-arrow button. You can change the order of selected fields by highlighting a field and clicking the **Up** or **Down** buttons.

3. In the **Row Count** field, specify the number of rows to use to display the fields you have selected. In the following example, six fields were selected, and **Row Count** was set to **2**:



In this example, data is configured to be displayed in two rows.

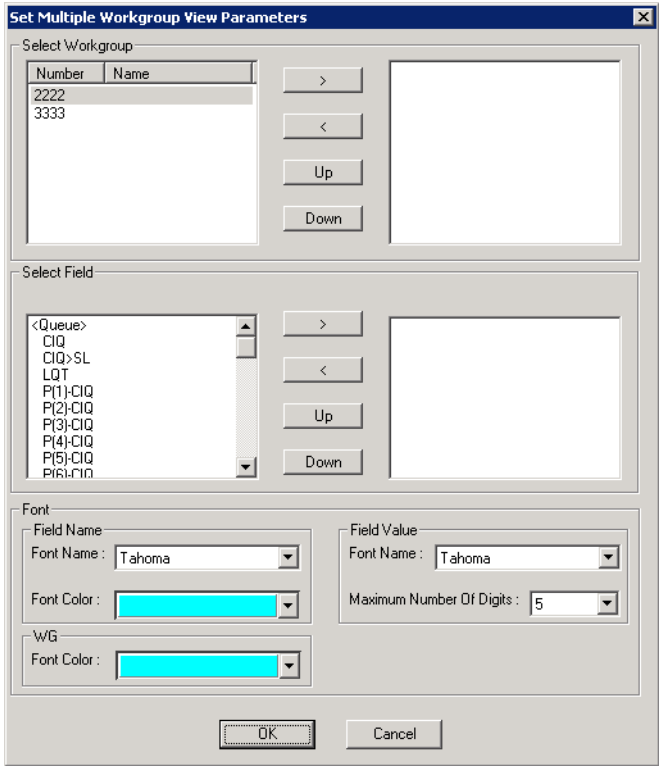
Figure 1. Data from a single workgroup is displayed

4. If you have selected more than one workgroup, specify in the **Rotate Interval** field how many seconds you want to display one workgroup view before MaxInSight rotates to the next group's view.
5. In the Field Name panel, specify a font and a color for the field names.
6. In the Field Value panel, specify a font and the maximum number of digits to display in a field. If the field value is more than the maximum number of digits specified, then "**?**" will be displayed. For example if the maximum number of digits is set to **2** but the field value is **123**, then the content display on the view will be "**1?**".

   Note: Font *color* for the field value is set in the Alerting Configuration dialog box (**Configure > Configure Alerting**).
7. In the WG panel, specify a color for the workgroup number.

Configuring Simultaneous Row-Type Views of Multiple Groups

To configure simultaneous row views of multiple workgroups, choose **Add > Add Multiple Workgroup View**. The configuration dialog box for multiple workgroup views is similar to that for a single workgroup display.



To configure, see the steps in “Configuring for a Single Row-Type Display” on page 13.

In a multiple workgroup view, each workgroup’s data is displayed in a separate row. The first column displays the number of the workgroup.

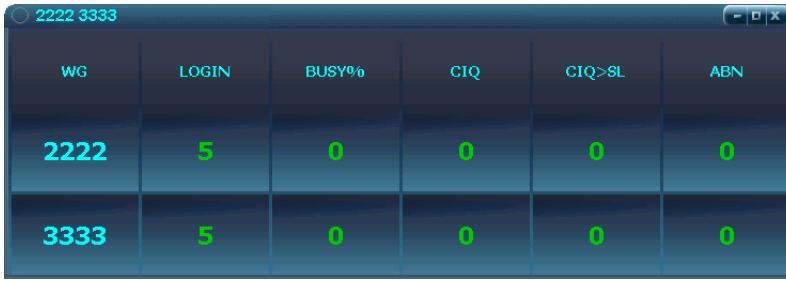


Figure 2. Data from two workgroups displayed, each in its own row

Configuring Other Data Displays

In addition to the basic row views, you can configure four other views:

Gauge - used to show the real time status of a single data value in a dial format.

Timeline - used to display trends of data elements over time. The data points are plotted on the graph and connected with lines.

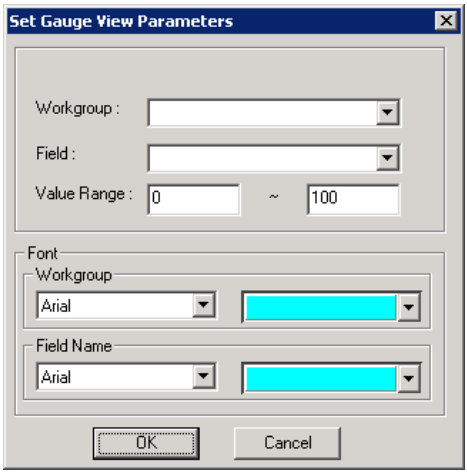
Vertical or Horizontal Bars - used to display one field of either one workgroup or multiple workgroups in a vertical or horizontal bar view. This view reflects either historical data or real time data, whichever you specify.

Gauge View

A gauge view displays the status of a single field in an easy-to-read dial format. With a gauge view and with alerting configured, it's easy to see, for example, whether service level is normal or too low, the number of callers in queue is too high, or queue time is too long.

To set parameters for a gauge view,

1. Choose **Add > Add Gauge View**. The Set Gauge View Parameters dialog box opens:



2. Specify the workgroup, the field to track, and a value range.

Note: Only the fields appropriate to a gauge view are available

3. Select a font and color for the workgroup and for the field name.
4. Click **OK**.

A gauge view is displayed similar to the following:

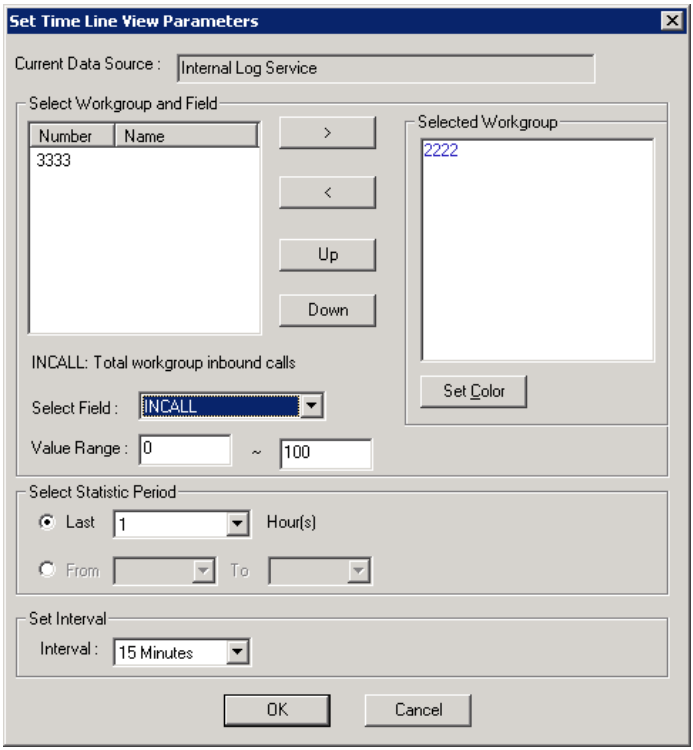
Figure 3. Gauge view set to show % of abandoned calls, up to 16 calls

Time Line View

A time line view is used to display trends of data elements over time. The data points are plotted on a graph and connected with lines.

To set parameters for a time line view,

1. Choose **Add > Add Time Line View**. The Set Time Line View Parameters dialog box opens.



2. Select one or more workgroups. To select a workgroup, highlight the workgroup and click the Right-arrow button.
3. To specify the color of the lines, highlight a selected workgroup, click **Set Color** and select a color. Repeat for each additional workgroup.
4. From the **Select Field** drop-down list, select a field to chart . Only the fields of data from the logger service you specified at login will appear in the drop-down list. (The logger service is shown in the **Current Data Source** field.)
5. In the **Value Range** fields, specify a value range for the field you want to chart.
6. Specify the period for which you want to display statistics: either the last *x* hours (select from 1-24), or a time period you specify in the

From and **To** fields (24-hour clock). Be sure the time you select in the **From** field precedes the time you select in the **To** field.

7. Select a time interval: 15 minutes, 30 minutes, or one hour.
8. Click **OK**. A time line view is displayed. The workgroup number(s) and display colors are shown at the top.

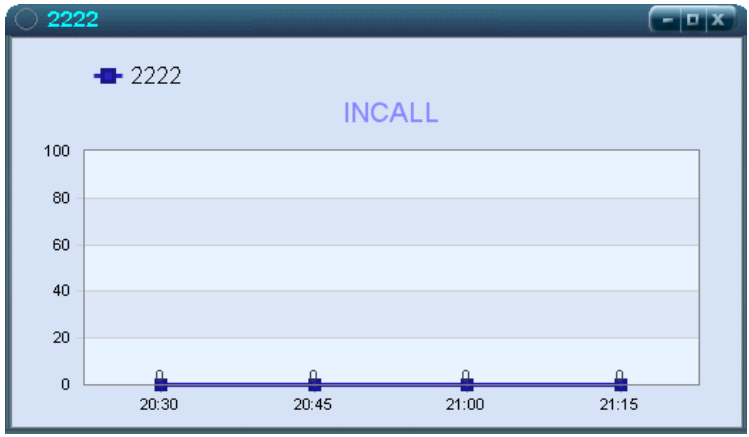
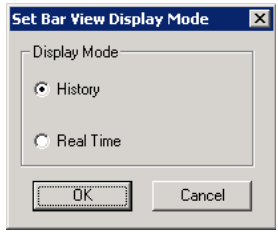


Figure 4. Time Line View showing number of incalls every 15 minutes for the last hour

Bar Views - Vertical and Horizontal

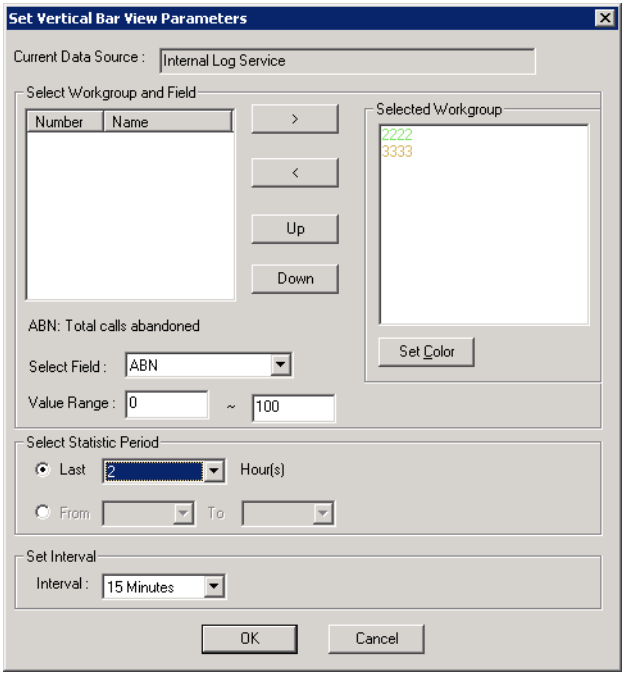
You can display one selected field of multiple workgroups in a bar view that shows either historical data or real time data.

1. Choose either **Add > Add Vertical Bar View** or **Add > Add Horizontal Bar View**. The following dialog box appears.



2. Select **History** to display historical data, or select **Real Time** to display real time data, and click **OK**. A dialog box opens where you can set parameters.

If you selected **History**, the following dialog box opens:



1. Select one or more workgroups. To select a workgroup, highlight the workgroup and click the Right-arrow button.
2. To specify the color of the bars, highlight a selected workgroup, click **Set Color** and select a color. Repeat for each workgroup selected.
3. To change the order of workgroups in a view, highlight a selected workgroup and click the **Up** or **Down** button.
4. Select a field to chart from the **Select Field** drop-down list. Only the fields of statistics data from the logger service you specified at login will appear in the drop-down list. (The logger service is shown in the **Current Data Source** field.)

5. In the **Value Range** fields, specify a value range for the field you want to chart.
6. Specify the period for which you want to display statistics: either the last *x* hours (select from 1-24), or a time period you specify in the **From** and **To** fields (24-hour clock). Be sure the time you select in the **From** field precedes the time you select in the **To** field.
7. Select a time interval for display: 15 minutes, 30 minutes, one hour.
8. Click **OK**. A bar view is displayed. Workgroup number(s) and their display colors are shown at the top.

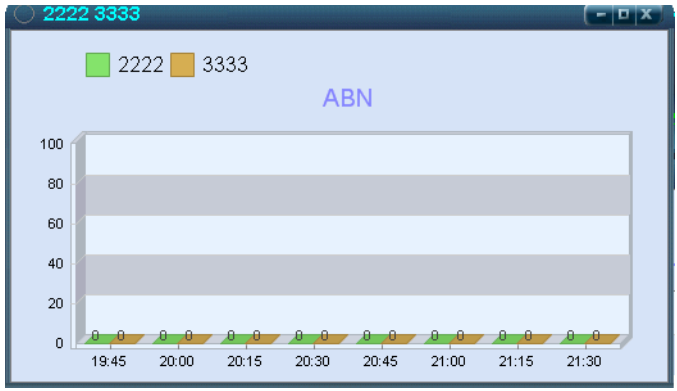
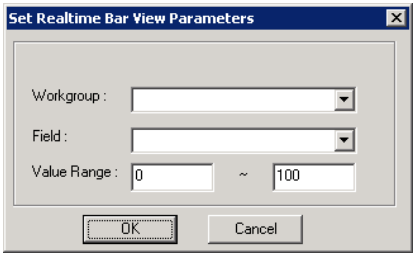


Figure 5. A vertical bar view showing history data for abandoned calls in two workgroups. (No calls were abandoned.)

Figure 6. A horizontal bar view showing history data for abandoned calls in two workgroups. (No calls were abandoned.)

If you selected **Real Time** in the Bar View Display Mode dialog box, the following dialog box opens:



1. Select a workgroup.
2. Select a field to view.
3. Specify a value range for the field you want to view.
4. Click **OK**. A bar view is displayed. The workgroup number and display color are shown at the top.

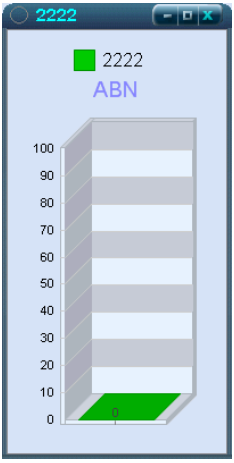


Figure 7. Vertical bar view showing number of abandoned calls for a workgroup. (No calls were abandoned.)

Changing the Parameters of a View

To change the parameters of a view you're displaying in MaxInSight, right-click the view, and choose **Modify View Parameters**. Make your changes in the Parameters dialog box and click **OK**.

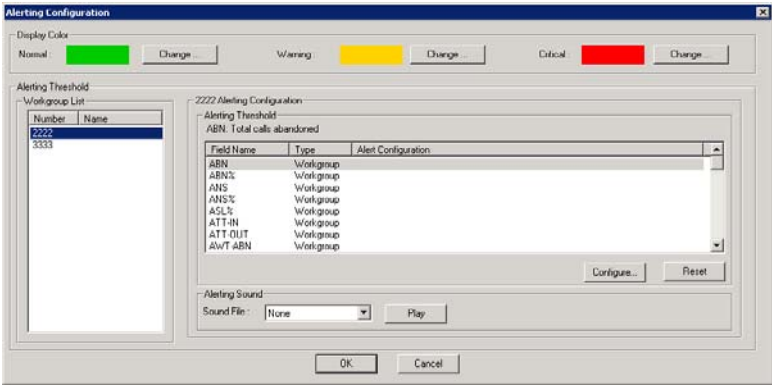
The right-click menu on a view

Configuring Alerts

For each field you're interested in tracking, you can choose to be alerted when data in the field crosses a threshold you specify (a *warning* threshold and a *critical* threshold). MaxInSight alerts you through a different color display and, optionally, by playing a sound file.

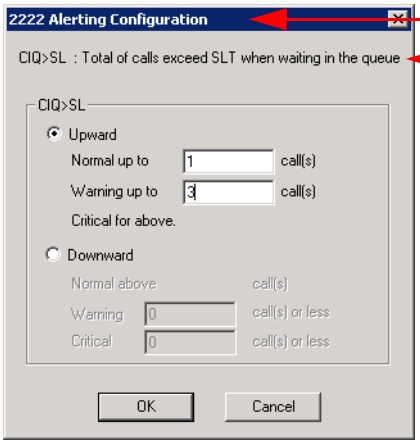
To configure alerts for a field,

1. Choose **Configure > Configure Alerting**.



2. Select the display colors you want to use for normal, warning and critical levels. By default, green represents normal level, yellow represents warning level, and red represents critical level.
3. Select a workgroup in the Workgroup List, and then select a field on which you want to set the threshold for the three levels.

   Note: To arrange the **Workgroup Number**, **Workgroup Name**, **Field Name**, or the **Type** columns in ascending or descending order, click the column heading. Click again to reverse order.
4. Click the **Configure** button or double-click the field. The Alerting Configuration dialog box for the selected workgroup opens:



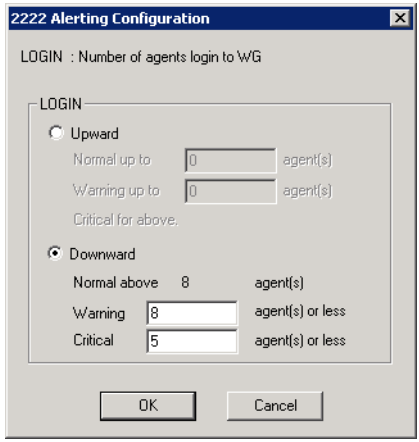
The workgroup number

The field you selected is described here

The dialog box varies, depending on the field you selected

5. Select **Upward** or **Downward**, as appropriate, configure the field's threshold(s), and click **OK**. Your configuration is displayed in the Alerting Configuration dialog box.

   Note: If you select **Downward**, the **Normal above** field is filled in automatically when you specify the warning level. For example:



When **8** was entered in the **Warning** field, **8** appeared automatically in the **Normal above** field

6. If you want, configure an alerting sound to be played when the field value falls into the warning or critical level. To do so, select a file from the **Sound Fil**e drop-down list. You can click the **Play** button to preview the sound.

   Note: Wave files are stored in the WAV folder under the MaxInSight folder. You can add your own sound file to this folder, and it will appear in the selection list. The duration of your sound file should be less than 5 seconds.

   Note: Only one sound file can be used per workgroup.

7. When you are finished configuring, click **OK**.

In this view, alerting parameters are set to: 10 calls in queue is normal, 11-13 CIQ is at the warning level, more than 13 CIQ is at the critical level

Figure 8. Example of a gauge view with alerting parameters set

Clearing an Alert Threshold Configuration

To quickly clear an alert threshold configuration on a field, open the Alert Configuration dialog box (**Configure** > **Configure Alerting**), select the workgroup and then the field whose configuration you want to clear, and click the **Reset** button.

List of Fields

The following tables show all the fields supported in MaxInSight. They also show what fields are available to what kinds of views. (In the tables, *Numeric* means single workgroup view and multiple workgroup view.)

					Single Data/Multi-WG	
WG Queue RT Status:		Real Time				
Abbreviation	Description	Numeric	Gauge	Time Line	V. Bar	H. Bar
CIQ	# of Calls in Queue	YES	YES	No	YES	YES
CIQ>SL	# of Calls in Queue > Service Level Threshold	YES	YES	No	YES	YES
QSL%	% of Calls in Queue > Service Level Threshold	YES	YES	No	YES	YES
LQT	Longest Queue Time	YES	YES	No	YES	YES
VM	# of new VM in WG mail box	YES	YES	No	YES	YES
CIQ-P(n)	# of Calls in Queue with Priority (n)	YES	YES	No	YES	YES

Table 1: Workgroup queue real time status fields

Agent Availability Status:		Real Time				
Abbreviation	Description	Numeric	Gauge	Time Line	V. Bar	H. Bar
UNSTAFF	# of agents become virtual extension	YES	YES	No	YES	YES
LOGOUT	# of agents logout of WG	YES	YES	No	YES	YES
LOGIN	# of agents log into WG	YES	YES	No	YES	YES
BUSY	# of login agents in connect state	YES	YES	No	YES	YES
IDLE	# of login agents in idle state	YES	YES	No	YES	YES
WRAPUP	# of login agents in wrap-up state	YES	YES	No	YES	YES
N-READY	# of login agents in Not-Ready state	YES	YES	No	YES	YES
DND/FWD	# of login agents in DND/FWD state	YES	YES	No	YES	YES
ERROR	# of login agents in Error state	YES	YES	No	YES	YES
BUSY%	% of login agents in connect state	YES	YES	No	YES	YES
IDLE%	% of login agents in idle state	YES	YES	No	YES	YES
WRAP%	% of login agents in wrap-up state	YES	YES	No	YES	YES
N-READY%	% of login agents in Not-Ready state	YES	YES	No	YES	YES
DND/FWD%	% of login agents in DND/FWD state	YES	YES	No	YES	YES
ERROR%	% of login agents in Error state	YES	YES	No	YES	YES

Table 2: Agent availability status fields

Daily Performance Statistic (since midnight)		Update every 15 min				
Abbreviation	Description	Numeric	Gauge	Time Line	V. Bar	H. Bar
INCALL	Total WG Inbound calls	YES	No	YES	YES	YES
ANS	Total Calls Answered	YES	No	YES	YES	YES
ABN	Total Calls Abandoned	YES	No	YES	YES	YES
OFL	Total Calls are Overflowed/Redirected	YES	No	YES	YES	YES
AWT-ALL	Average Wait Time for all WG Inbound Calls	No	No	YES	YES	YES
AWT-ANS	Average Wait Time for Answered Calls	YES	No	YES	YES	YES
AWT-ABN	Average Wait Time for Abandoned Calls	YES	No	YES	YES	YES
AWT-OFL	Average Wait Time for Overflow/Redirected Calls	No	No	YES	YES	YES
AHT	Average Hold Time for Answered Calls	No	No	YES	YES	YES
OUTCALL	TOTAL OUTCALL : Total Outbound Calls	YES	No	YES	YES	YES
ATT-IN	Average Talk Time – Inbound Calls	YES	No	YES	YES	YES
ATT-OUT	Average Talk Time – Outbound Calls	YES	No	YES	YES	YES
TCIQ	Total Calls in Queue	YES	No	YES	YES	YES
MAXCIQ	MAXCIQ : Maximum Calls in Queue	YES	No	YES	YES	YES
MAXQT	MAXQT: Maximum Queue Time	YES	No	YES	YES	YES
ANS%	% of Inbound Calls Answered	YES	YES	YES	YES	YES
ABN%	% of Inbound Calls Abandoned	YES	YES	YES	YES	YES
OFL%	% of Inbound Calls Overflowed	YES	YES	YES	YES	YES
TSL%	Total Calls Service Level %	YES	YES	YES	YES	YES
ASL%	Answered Calls Service Level %	YES	YES	YES	YES	YES
TCIQ%	% of Total Calls in Queue since midnight	YES	YES	YES	YES	YES

Table 3: Daily performance statistics fields

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